



Track Inventory with Our New Serialization Feature

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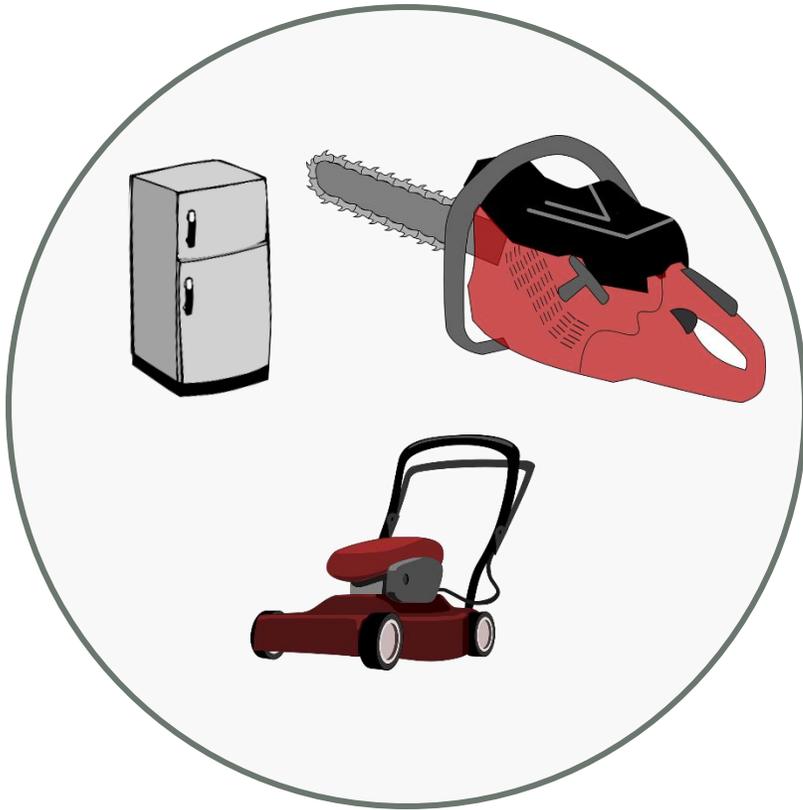
Chief Experience Officer

January 21, 2020

WHAT YOU'LL LEARN

- What is product serialization?
- Common scenarios
- How serialization works in Paladin
 - Identifying serialized items
 - Receiving serialized items
 - Selling serialized items
 - Managing serial numbers
 - Serial Number List report
 - Multi-store serialized item transfers

What is product serialization?



Product serialization is the process of assigning unique IDs or “serial numbers” to individual items in a product line.

Serial numbers are typically used for high-value products, such as power equipment, chainsaws, power tools, and appliances.

Common serialization scenarios



Serial numbers are useful in many scenarios including:

- Managing warranty coverage
- Maintaining ownership records
- Supplier traceability
- Enhanced accountability

How serialization works in Paladin

The Paladin serialization feature lets you maintain and track serial numbers for any product in your store.

- **PO Receive:** Serial numbers are added when items are received.
- **Invoice/Quote:** When a serialized item is sold or returned, the cashier is required to specify the serial number before the transaction can be completed.
- **Inventory:** A current list of in-stock serial numbers and a detailed serial number history and status is maintained for each inventory item.
- **Reports:** View a complete list of your serialized products and all their serial numbers in Paladin, including current serial number status.

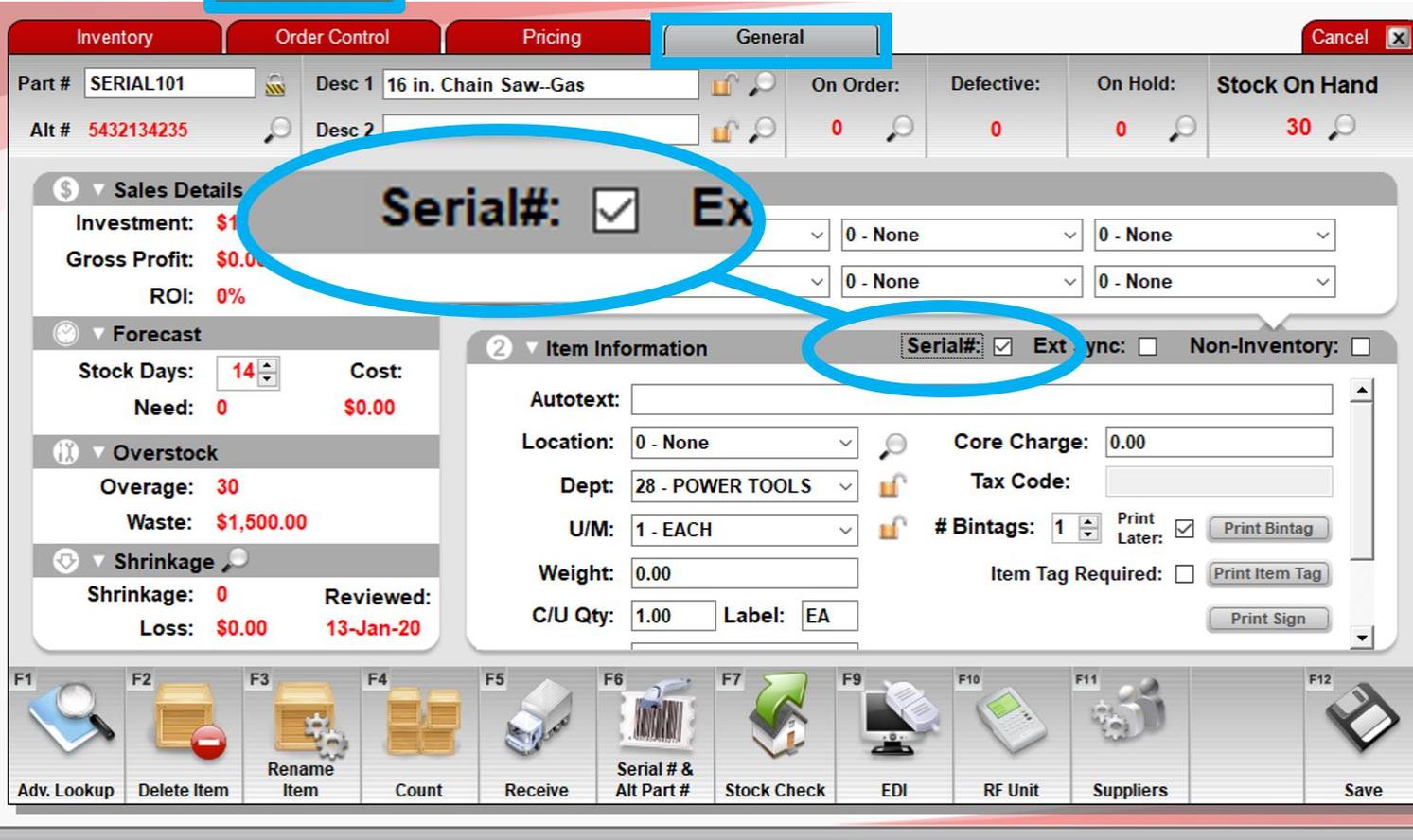
How serialization works in Paladin

- Paladin has incorporated multiple safeguards to help you maintain exactly one serial number for each serialized item in your inventory.
- Paladin prevents you from adding duplicate serial numbers to an item.
- Paladin maintains a detailed serial number history for every serial number event and status change.
- Paladin tracks not only the serial number, but also the date received and receiving cost of each serialized item.

Identifying serialized items

Inventory module

Identifying serialized items in your inventory



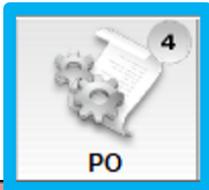
The screenshot shows the 'General' tab of the Inventory module. The 'Serial#' checkbox is checked and circled in blue. The 'Ext. Sync' checkbox is also checked and circled in blue. The 'Non-Inventory' checkbox is unchecked. The 'Item Information' section includes fields for Autotext, Location, Dept, U/M, Weight, C/U Qty, Label, Core Charge, Tax Code, # Bintags, and Item Tag Required. The 'Sales Details' section includes fields for Investment, Gross Profit, and ROI. The 'Forecast' section includes fields for Stock Days, Need, and Cost. The 'Overstock' section includes fields for Overage and Waste. The 'Shrinkage' section includes fields for Shrinkage and Loss. The 'Inventory' tab is selected, and the 'General' tab is active. The 'Part #' is SERIAL101 and the 'Desc 1' is 16 in. Chain Saw--Gas. The 'Stock On Hand' is 30. The 'Serial#' checkbox is checked and circled in blue. The 'Ext. Sync' checkbox is also checked and circled in blue. The 'Non-Inventory' checkbox is unchecked. The 'Item Information' section includes fields for Autotext, Location, Dept, U/M, Weight, C/U Qty, Label, Core Charge, Tax Code, # Bintags, and Item Tag Required. The 'Sales Details' section includes fields for Investment, Gross Profit, and ROI. The 'Forecast' section includes fields for Stock Days, Need, and Cost. The 'Overstock' section includes fields for Overage and Waste. The 'Shrinkage' section includes fields for Shrinkage and Loss. The 'Inventory' tab is selected, and the 'General' tab is active. The 'Part #' is SERIAL101 and the 'Desc 1' is 16 in. Chain Saw--Gas. The 'Stock On Hand' is 30.

To identify a product as a serialized item, in the **Inventory** module, on the **General** tab, select the **Serial#** checkbox.

Receiving items with serial numbers

PO module

Receiving items with serial numbers



Receive PO
Confirm Receive
Cancel

PO #

EDI

Supplier

Address 1

Address 2

City/State/Zip

Phone

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.000 Old Sell: \$160.00 Mar: 69% Ref Mar: 00% New Sell: \$160.00 Mar: 69%		SERIAL #		
<input type="checkbox"/>	PART1	HAMMER	EACH 40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000 Old Sell: \$20.00 Mar: 50% Ref Mar: 00% New Sell: \$20.00 Mar: 50%		0		
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	EACH 5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000 Old Sell: \$300.00 Mar: 50% Ref Mar: 00% New Sell: \$300.00 Mar: 50%		SERIAL #		
<input type="checkbox"/>			ORD			
			REC			

F1 

Advanced
Lookup

F2 

Add
Note

F3 

Zero Qty
Received

F4 

Displaying
Open | All

F5 

Recall
Inventory

F6 

Find PO

F7 

Review
RF Receiving

F8 

Process

Total \$ 1,300.00

In the **PO** module, when you receive serialized items you must add serial numbers before you can process the PO.

A red **Serial #** warning indicates that the PO item needs serial numbers.



Receiving items with serial numbers

Receive PO Confirm Receive Cancel

PO # 1234 Supplier 12 - MY BEST SUPPLIER Address 2 Phone
 EDI Address 1 100 Main Street City/State/Zip Baltimore, MD, 21279-1047 Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw—Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.000 Mar: 00%	0	SERIAL #		
<input type="checkbox"/>	PART1	20,000 BTU	40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000 Mar: 00%	0			
<input type="checkbox"/>	SERIAL102	20,000 BTU	5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000 Old Sell: \$300.00 Mar: 50% Ref Mar: 00% New Sell: \$300.00 Mar: 50%	0	SERIAL #		
			ORD			
			REC			

F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F4 Displaying Open | All F5 Recall Inventory F6 Find PO F7 Review RF Receiving F8 Process

Total \$ 1,300.00

You can add, edit and view serial numbers using the quick access (right-click) menu.

- **Add Serial #:** Opens the **Add/Remove Serial Numbers** window.
- **Find Next Serial # Warning:** Moves to the next PO item that needs serial numbers.



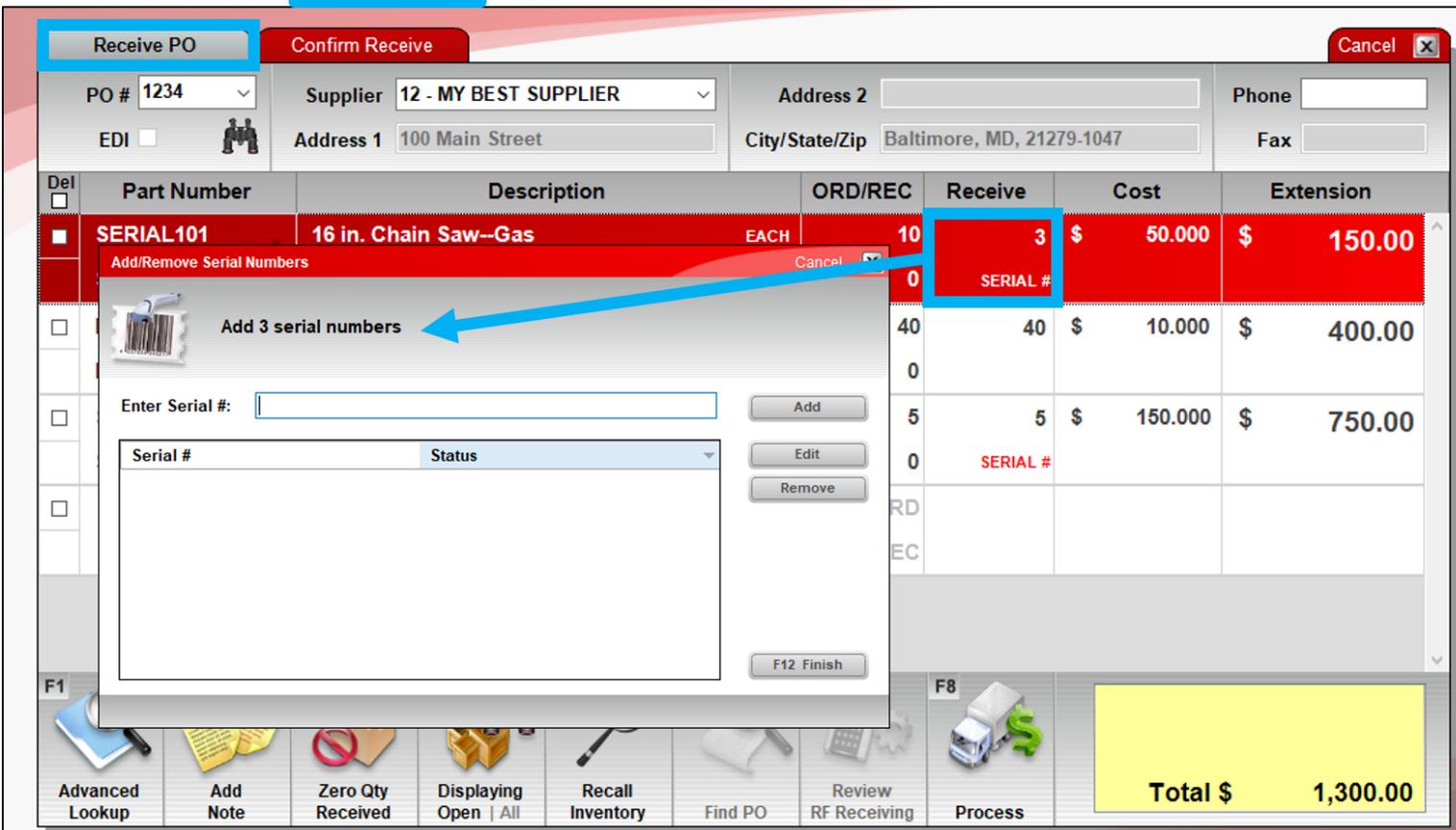
Receiving items with serial numbers

Right-click a serialized item and select **Add Serial #** to open the **Add/Remove Serial Numbers** window.

Enter or scan serial numbers to add them to the item.

As you add serial numbers, the required number in the message decreases:

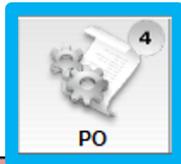
Add ## serial numbers.



Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
	SERIAL101	16 in. Chain Saw--Gas	EACH	10		
				3	\$ 50.000	\$ 150.00
				0		
				40	\$ 10.000	\$ 400.00
				0		
				5	\$ 150.000	\$ 750.00
				0		

Total \$ 1,300.00

Receiving items with serial numbers



Receive PO
Confirm Receive
Cancel

PO #

EDI

Supplier

Address 1

Address 2

City/State/Zip

Phone

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH	10	3	\$ 50.000
	1	Old Cost: \$50.000 Ref Mar: 00%				\$ 150.00
		Required serial #'s added			SERIAL #	
<input type="checkbox"/>	PART1	HAMMER	EACH	40	40	\$ 10.000
	2	Old Cost: \$10.000 Old Sell: \$20.00 Mar: 50% Ref Mar: 00% New Sell: \$20.00 Mar: 50%		0		\$ 400.00
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	EACH	5	5	\$ 150.000
	3	Old Cost: \$150.000 Old Sell: Ref Mar: 00% New Sell:				\$ 750.00
		Needs serial #'s			SERIAL #	
			ORD			
			REC			

F1 

Advanced
Lookup

F2 

Add
Note

F3 

Zero Qty
Received

F4 

Displaying
Open | All

F5 

Recall
Inventory

F6 

Find PO

F7 

Review
RF Receiving

F8 

Process

Total \$ 1,300.00

When the required serial numbers are entered for an item, the **Serial #** label turns from red to black.



Receiving items with serial numbers

Receive PO
Confirm Receive
Cancel x

PO #

Supplier

Address 2

Phone

EDI

Address 1

City/State/Zip

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	7	\$ 50.000	\$ 350.00

Add/Remove Serial Numbers
Cancel x

Add 6 serial numbers

Enter Serial #:

Add

Edit

Remove

Serial #	Status
Y92453298	Pending Receive
A23424234	Received
Y43256890	Received
D232322242	Received

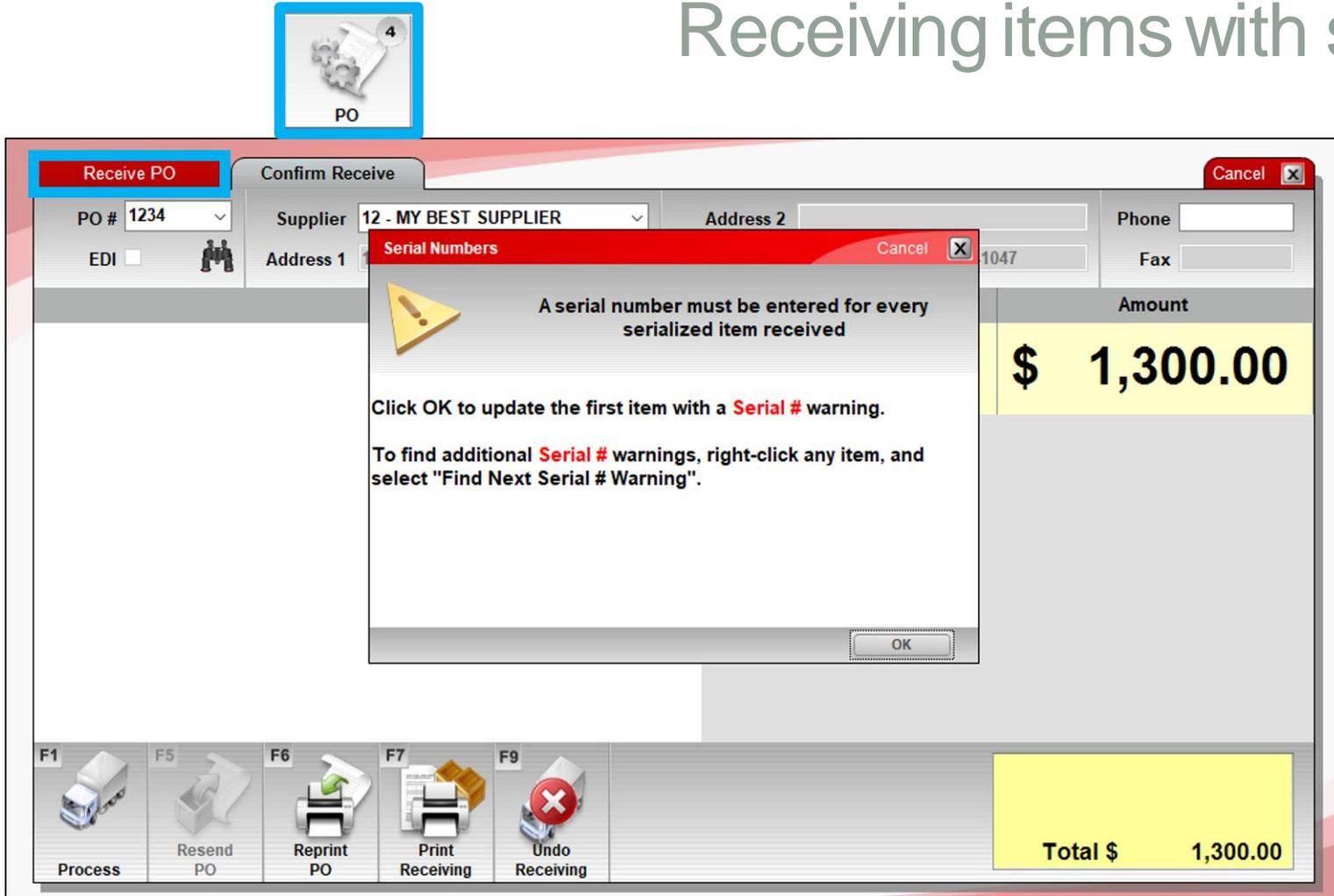
F12 Finish

Total \$

350.00

Serial numbers previously received on a partially-received PO, will appear in light gray with a **Status of Received** and cannot be edited.

Receiving items with serial numbers



PO

Receive PO

Confirm Receive

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone

EDI

Address 1

1047

Fax

Amount

\$ 1,300.00

Serial Numbers

A serial number must be entered for every serialized item received

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

OK

Cancel

F1 Process

F5 Resend PO

F6 Reprint PO

F7 Print Receiving

F9 Undo Receiving

Total \$ 1,300.00

You must resolve all **Serial #** warnings before you can process a PO.

As a safeguard, if you try to process a PO. without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

Selling items with serial numbers

Invoice/Quote module

Selling items with serial numbers



Invoice / Quote **Checkout** Cancel

Rewards 99887766558 Customer 6295 - JOHN SMITH Address 2 Phone
Credit 0.00 Address 1 1500 MAIN AVE City/State/Zip NICE CITY, KS, 00000 Fax

Tax	Def	Net	Part	Price	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101		40	0.00	\$ 160.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101		0		

SOH ORD

Add Serial Numbers Cancel

Enter or select 1 serial number for part # 'SERIAL101'

Enter Serial Number

Available Serial Numbers

- B24039542
- N24531215
- D23232242
- E98765432
- P92384859
- I12RE2341
- YISADFA1
- N31OIOU4
- Y12SRE12
- NWA4239
- PA134110
- F12342882L
- IIISORI219

Selected Serial Numbers

- A23424234

Select >>> <<< Remove F12 Finish

Total \$ 160.00
Tax \$ 12.80
Total \$ 172.80

F1  F2 

Advanced Lookup Add Note Delete Line Item Discount Item Account Payment Store Transaction Stock Check Checkout

In the **Invoice/Quote** module, when a cashier adds a serialized item to an invoice, they will be prompted to select a serial number from the available serial numbers for that item.



Selling items with serial numbers

Add Serial Numbers

Enter or select 1 serial number for part # 'SERIAL1'

Enter Serial Number

Available Serial Numbers

A23424234
B24039542
N24531215
D23232242
E98765432
P92384859
I12RE2341
YISADFA1
N31OIOU4
Y12SRE12
NWA4239
PA134110
E123428821

Select >>> <<< Remove

Selected Serial: W98213489

F12 Finish

Add Serial Number [Cancel]

 **Serial number not found on this item**

Do you want to add the new serial number 'J31489002' to this item?

Caution: Serial numbers are not typically added at the time of sale. Make sure the serial number is correct

Manager password required:

Cancel Add

If the serial number does not appear in the list, you can enter it manually with manager approval.

Selling items with serial numbers



Invoice / Quote
Checkout
Cancel X

Rewards
 Credit

Customer
 Address 1

Address 2
 City/State/Zip

Phone
 Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 IN. CHAIN SAW--GAS	EACH	2 \$ 160.00	\$ 320.00	
			SERIAL101	160.00				
			Serial #: A23424234					
			Serial #: B24039542					
			NOTES					
			NOTES					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE	CH	1 \$ 300.00	\$ 300.00	
			SERIAL102	300.00				
						SERIAL #		

SOH

ORD

Subtotal \$ 620.00
 Tax \$ 49.60
 Total \$ 669.60

F1 Advanced Lookup

F2 Add Note

F3 Delete Line Item

F4 Discount Item

F5 Account Payment

F6 Store Transaction

F7 Stock Check

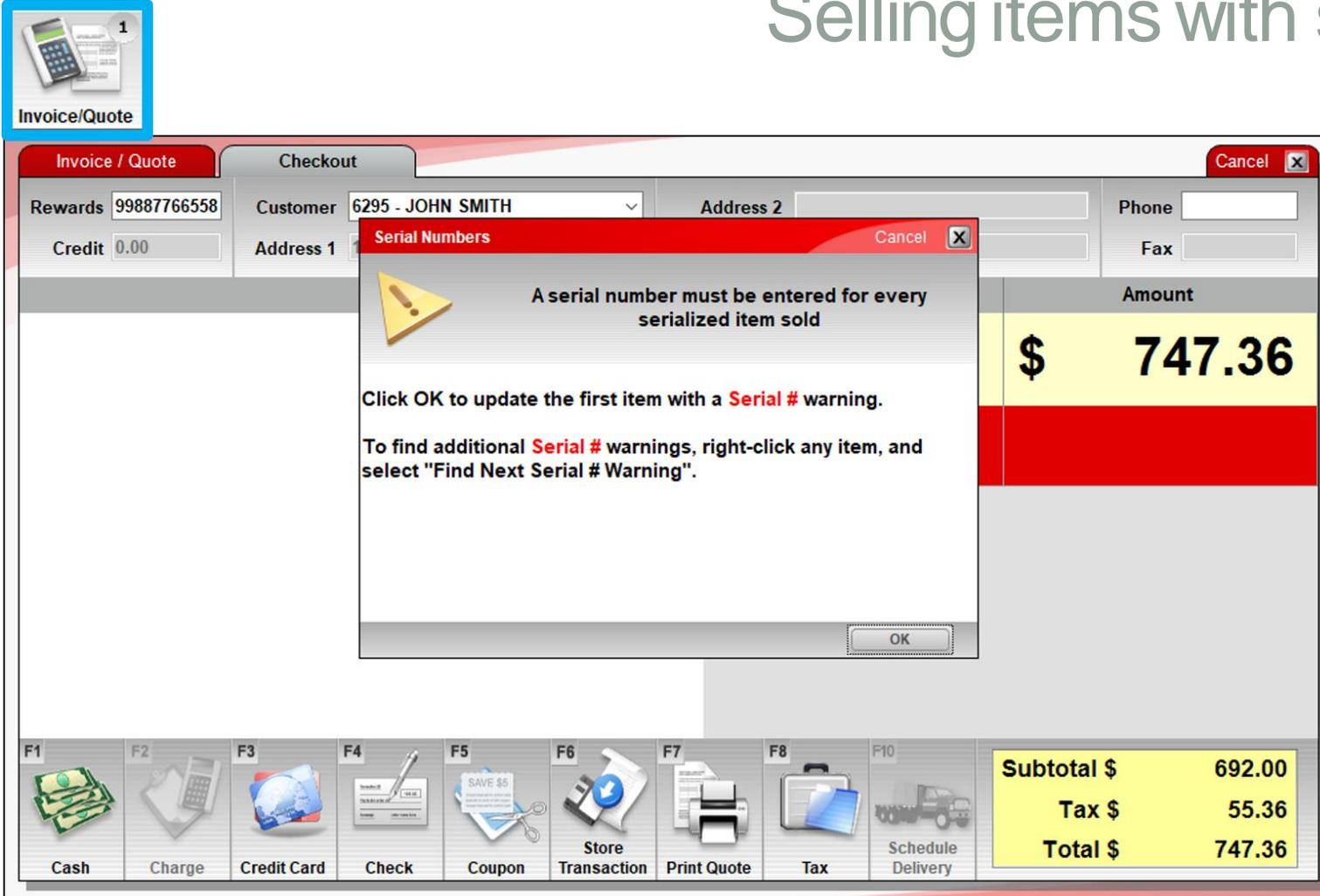
F8 Checkout

Serialized items are identified by a **SERIAL #** label.

Selected serial numbers are added as line items on the invoice.

A red **SERIAL #** warning indicates that the item does not have the required number of serial numbers.

Selling items with serial numbers



Invoice/Quote

Invoice / Quote Checkout Cancel

Rewards 99887766558 Customer 6295 - JOHN SMITH Address 2 Phone Fax

Credit 0.00 Address 1

Serial Numbers Cancel

 A serial number must be entered for every serialized item sold

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

OK

	Amount
\$	747.36

F1 Cash F2 Charge F3 Credit Card F4 Check F5 Coupon F6 Store Transaction F7 Print Quote F8 Tax F10 Schedule Delivery

Subtotal \$	692.00
Tax \$	55.36
Total \$	747.36

You must resolve all **Serial #** warnings before you can process an invoice.

As a safeguard, if you try to process an invoice without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

Selling items with serial numbers

Your Hardware Store

Thank you for shopping with us!

Your Hardware Store
 1000 Ace Lane
 Happyville, TX 12345
 (123) 456-7890

JOHN SMITH
 1500 MAIN AVE
 NICE CITY, KS 00000
 ACCOUNT # 7 6295

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			
PART1	1.00	20.00	20.00
EACH			
HAMMER			
PART2	2.00	26.00	52.00
EACH			
BUZZ SAW			

SUBTOTAL \$	692.00
TAX \$	55.36
TOTAL \$	747.36

CASH 747.36

EMPLOYEE	TERM	INV#	TIME	DATE
1	11	61316	05:42	20-Jan-20

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			

Serial numbers will appear on the customer's receipt for easy reference.

Selling items with serial numbers



Invoice / Quote Checkout Cancel X

Rewards Customer Address 2 Phone
Credit Address 1 City/State/Zip Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH	-1 \$ 160.00	\$ -160.00

38 Return Serial Numbers Cancel X

Enter or select 1 serial number for returned part # 'SERIAL101'

Enter Serial Number

Sold Serial Numbers Selected Serial Numbers

A123457890

F12 Finish

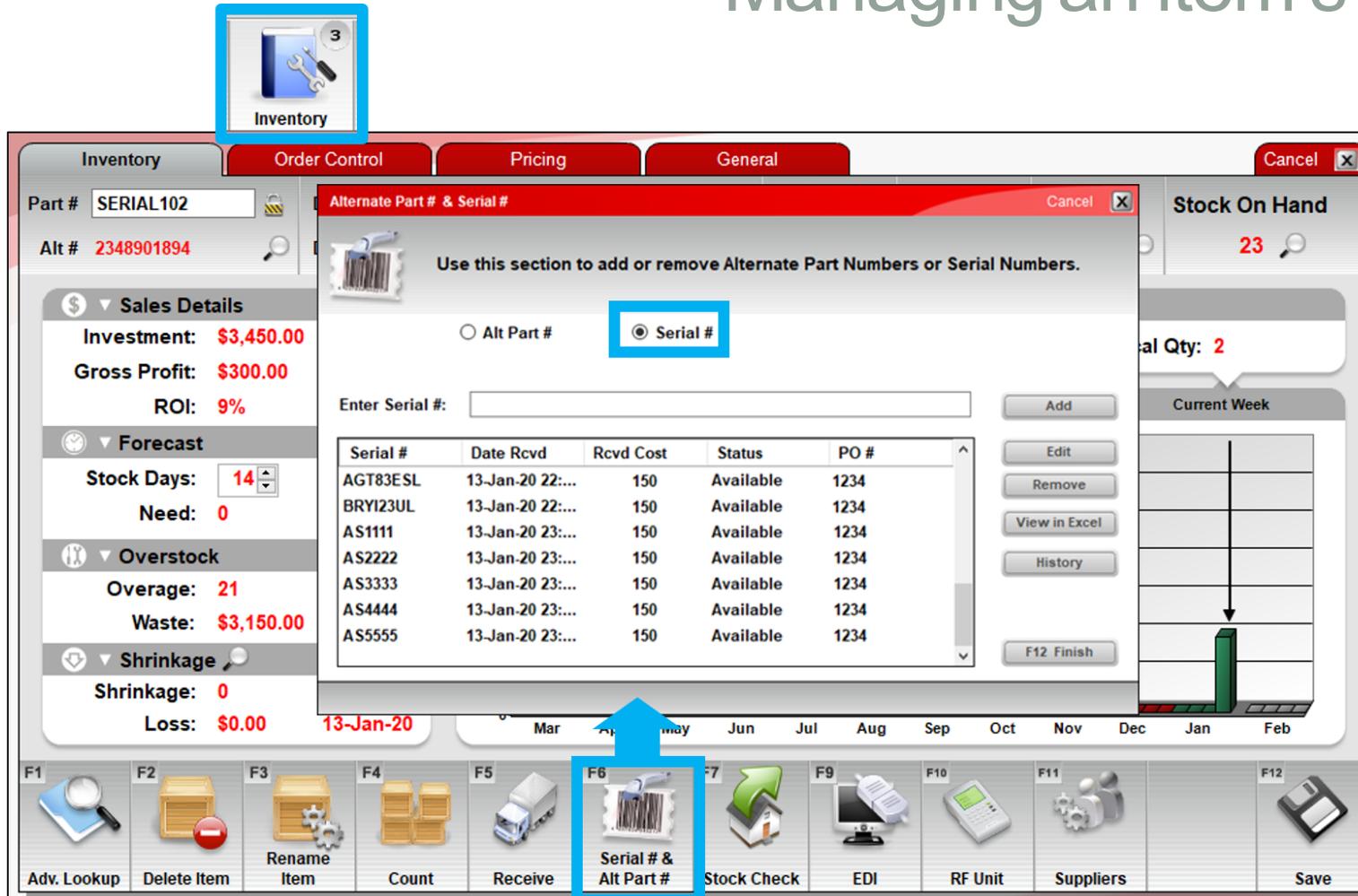
Subtotal \$ -160.00
Tax \$ -12.80
Total \$ -172.80

When a customer returns a serialized item, the cashier must select the serial number from this list of **Sold Serial Numbers** for that item.

The return cannot be processed until a serial number is selected.

Managing an item's serial numbers Inventory module

Managing an item's serial numbers



The screenshot displays the Inventory module interface. The 'Inventory' tab is selected, and the 'Alternate Part # & Serial #' dialog box is open. The dialog box has a red header and contains the following elements:

- Buttons: Cancel, X
- Text: Use this section to add or remove Alternate Part Numbers or Serial Numbers.
- Radio buttons: Alt Part #, Serial #
- Text field: Enter Serial #: []
- Buttons: Add, Edit, Remove, View in Excel, History, F12 Finish
- Table:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

The main interface shows the following details for Part # SERIAL102 (Alt # 2348901894):

- Investment: \$3,450.00
- Gross Profit: \$300.00
- ROI: 9%
- Stock Days: 14
- Need: 0
- Overage: 21
- Waste: \$3,150.00
- Shrinkage: 0
- Loss: \$0.00

The 'Stock On Hand' is 23. The 'Current Week' is highlighted. The bottom toolbar includes icons for Adv. Lookup, Delete Item, Rename Item, Count, Receive, Serial # & Alt Part # (highlighted with a blue arrow), Stock Check, EDI, RF Unit, Suppliers, and Save.

In the **Inventory** module, you can view and edit an item's available (in-stock) serial number list.

You can also access a detailed serial number history and view the serial number information in Excel.

Managing an item's serial numbers



Alternate Part # & Serial #



Use this

Alt F

Enter Serial #:

Book2 - Excel

File Home Insert Draw Page Layout Formulas Data Review View Add-ins Help Team Tell me

A4 4312AADA

	A	B	C	D	E
1	Partnumber: SERIAL102	Description: 20,000 BTU PORTABLE A/C	Avg Cost: \$150.00	Retail: \$300.00	Report Date: 20-Jan-20 11:59:46 AM
2					
3	Serial #	Date Rcvd	PO #	Rcvd Cost	Status
21	AS1111	13-Jan-20 11:42:27 PM	1234	150.000	Available
22	AS2222	13-Jan-20 11:42:27 PM	1234	150.000	Available
23	AS3333	13-Jan-20 11:42:27 PM	1234	150.000	Available
24	AS4444	13-Jan-20 11:42:27 PM	1234	150.000	Available
25	AS5555	13-Jan-20 11:42:27 PM	1234	150.000	Available

Sheet1

Ready Display Settings 100%

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

View in Excel

F12 Finish

To view the available serial number information in a spreadsheet, click **View in Excel** in the **Alternate Part # & Serial #** window.

Managing an item's serial numbers



Alternate Part # & Serial #

Use this section

Alt Part #

Enter Serial #:

Serial #	Date Rcvd	Quantity	Status	Location
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23JUL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

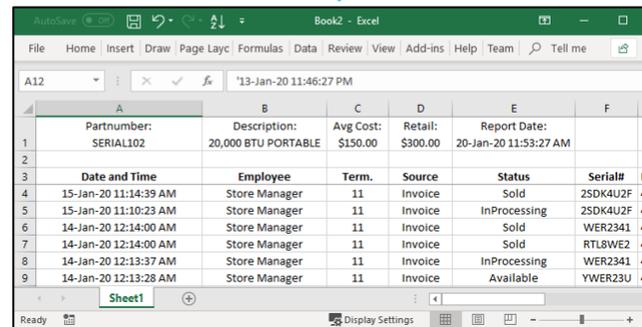
Buttons: View in Excel, History, F12 Finish

Date	Time	Employee	Term.	Source	Inv Id	Serial#	Status	Memo	Invoice Id	Cust Id	Store Id	PO #
14-Jan-20	00:14	Store M...	11	Invoice	44522	WER2341	Sold	Created...	61311	6295	0	
14-Jan-20	00:14	Store M...	11	Invoice	44522	RTL8WE2	Sold	Created...	61311	6295	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	WER2341	InProce...	Created...	-1	-1	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	Available	Previou...	-1	-1	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	InProce...	Previou...	-1	-1	0	
14-Jan-20	00:08	Store M...	11	Invoice	44522	RTL8WE2	InProce...	Created...	-1	-1	0	
13-Jan-20	23:46	Store M...	11	Manual	44522	AS2222	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:46	Store M...	11	Manual	44522	AS1111	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:45	Store M...	11	Manual	44522	AS93U420	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:45	Store M...	11	Manual	44522	AS1IEWF1	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS1111	Available		-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS2222	Available		-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS3333	Available		-1	-1	0	1234

Buttons: View in Excel, Done

The **Serial Number History** viewer (**click History**) provides detailed documentation and transparency for all events that involve a serial number.

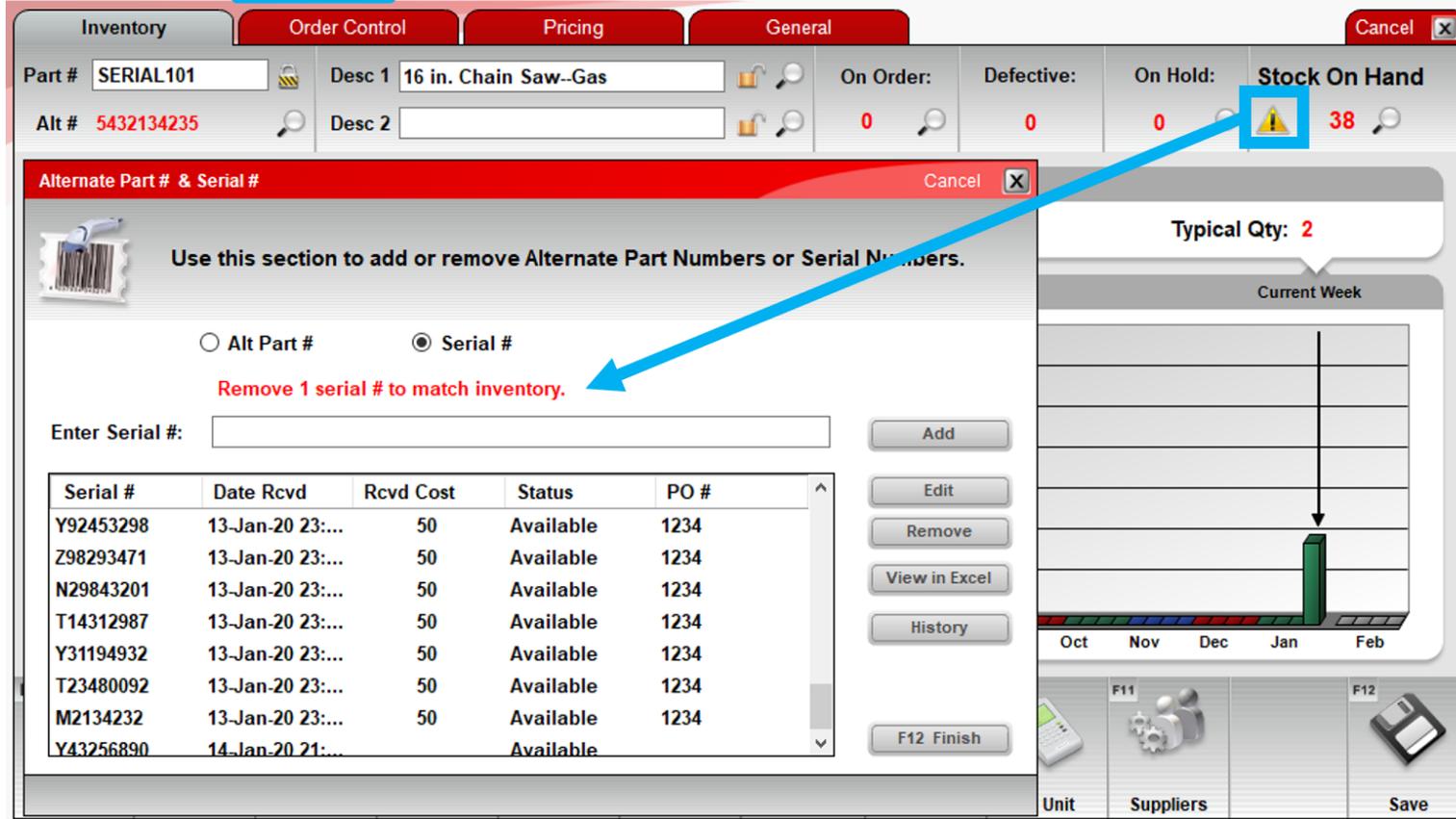
To review this information in an Excel spreadsheet, at the bottom of the **History** viewer window, click **View in Excel**.



Date and Time	Employee	Term.	Source	Status	Serial#	Inv
15-Jan-20 11:14:39 AM	Store Manager	11	Invoice	Sold	25DK4U2F	445
15-Jan-20 11:10:23 AM	Store Manager	11	Invoice	InProcessing	25DK4U2F	445
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	WER2341	445
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	RTL8WE2	445
14-Jan-20 12:13:37 AM	Store Manager	11	Invoice	InProcessing	WER2341	445
14-Jan-20 12:13:28 AM	Store Manager	11	Invoice	Available	YWER23U	445



Managing an item's serial numbers



Inventory | Order Control | Pricing | General | Cancel

Part # SERIAL101 | Desc 1 16 in. Chain Saw--Gas | On Order: 0 | Defective: 0 | On Hold: 0 | **Stock On Hand** 38

Alt # 5432134235 | Desc 2

Alternate Part # & Serial # | Cancel

Use this section to add or remove Alternate Part Numbers or Serial Numbers.

Alt Part # Serial #

Remove 1 serial # to match inventory.

Enter Serial #:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
Y92453298	13-Jan-20 23:...	50	Available	1234
Z98293471	13-Jan-20 23:...	50	Available	1234
N29843201	13-Jan-20 23:...	50	Available	1234
T14312987	13-Jan-20 23:...	50	Available	1234
Y31194932	13-Jan-20 23:...	50	Available	1234
T23480092	13-Jan-20 23:...	50	Available	1234
M2134232	13-Jan-20 23:...	50	Available	1234
Y43256890	14-Jan-20 21:...		Available	

Buttons: Add, Edit, Remove, View in Excel, History, F12 Finish

Typical Qty: 2

Current Week

Oct Nov Dec Jan Feb

Unit Suppliers Save

The number of available serial numbers should equal your stock on hand (SOH) quantity.

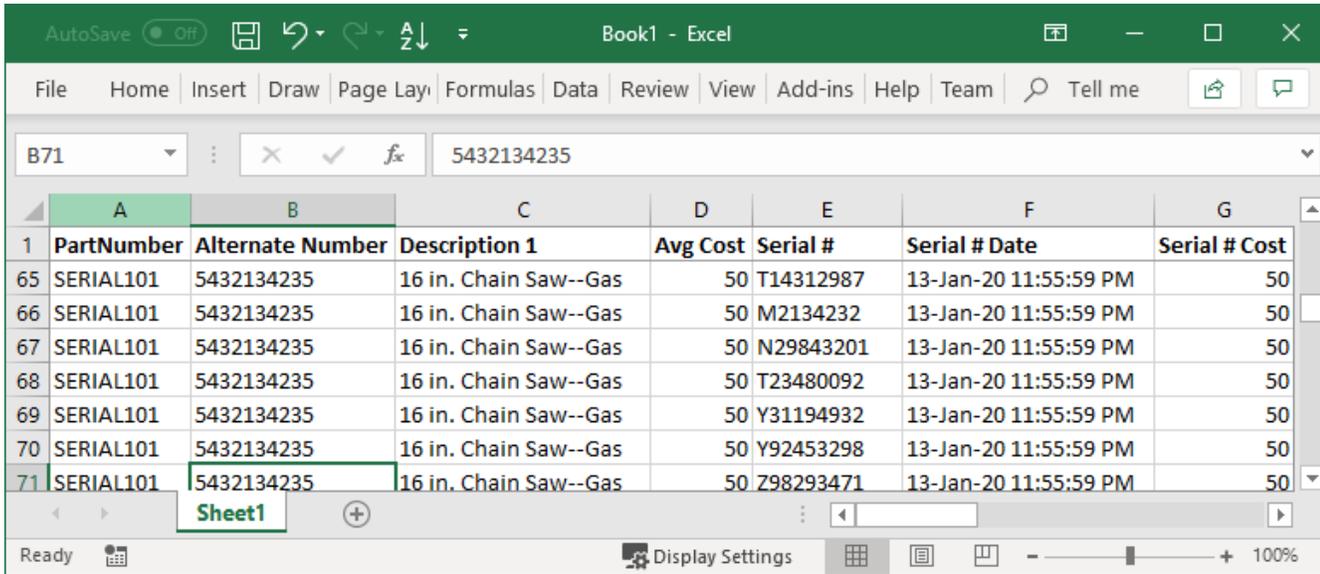
If there are too many or too few serial numbers for an item, a yield button with an exclamation point appears in the Inventory module next to the **SOH** value.

Click this button to view and address the discrepancy.

Serial Number Reporting

Reports module

Serial Number List Report



	A	B	C	D	E	F	G
1	PartNumber	Alternate Number	Description 1	Avg Cost	Serial #	Serial # Date	Serial # Cost
65	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T14312987	13-Jan-20 11:55:59 PM	50
66	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	M2134232	13-Jan-20 11:55:59 PM	50
67	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	N29843201	13-Jan-20 11:55:59 PM	50
68	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T23480092	13-Jan-20 11:55:59 PM	50
69	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y31194932	13-Jan-20 11:55:59 PM	50
70	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y92453298	13-Jan-20 11:55:59 PM	50
71	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Z98293471	13-Jan-20 11:55:59 PM	50

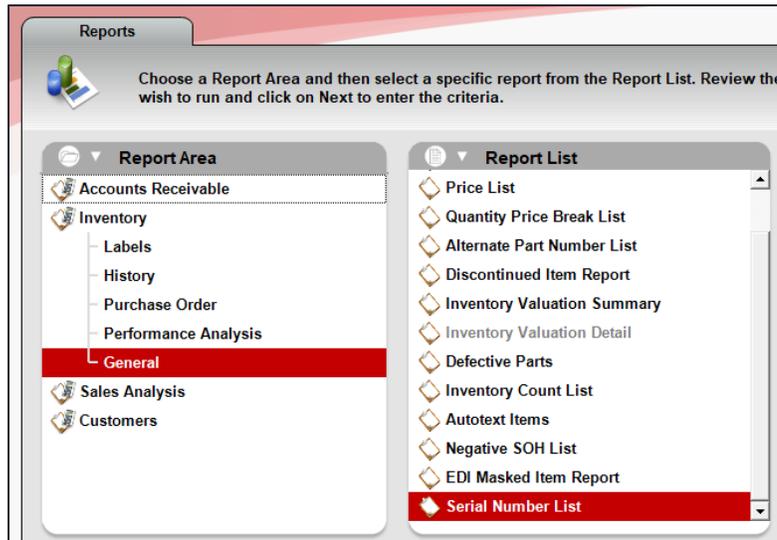
The **Serial Number List Report** provides a itemized list of serialized items and their serial numbers including:

- Serialized Part # & Alt Part #
- Serialized item description
- Serial #'s (one serial # per line)
- Serial # added/received date
- Current serial # status (Available, Sold, etc.)
- Supplier cost when serial # was received (if available)
- Received PO # (if available)

Serial Number List Report

The **Serial Number List** Report is available in the **Reports** module, in the **Inventory > General** category.

You can filter your report by specifying inventory item parameters in the **Report Settings** pane.

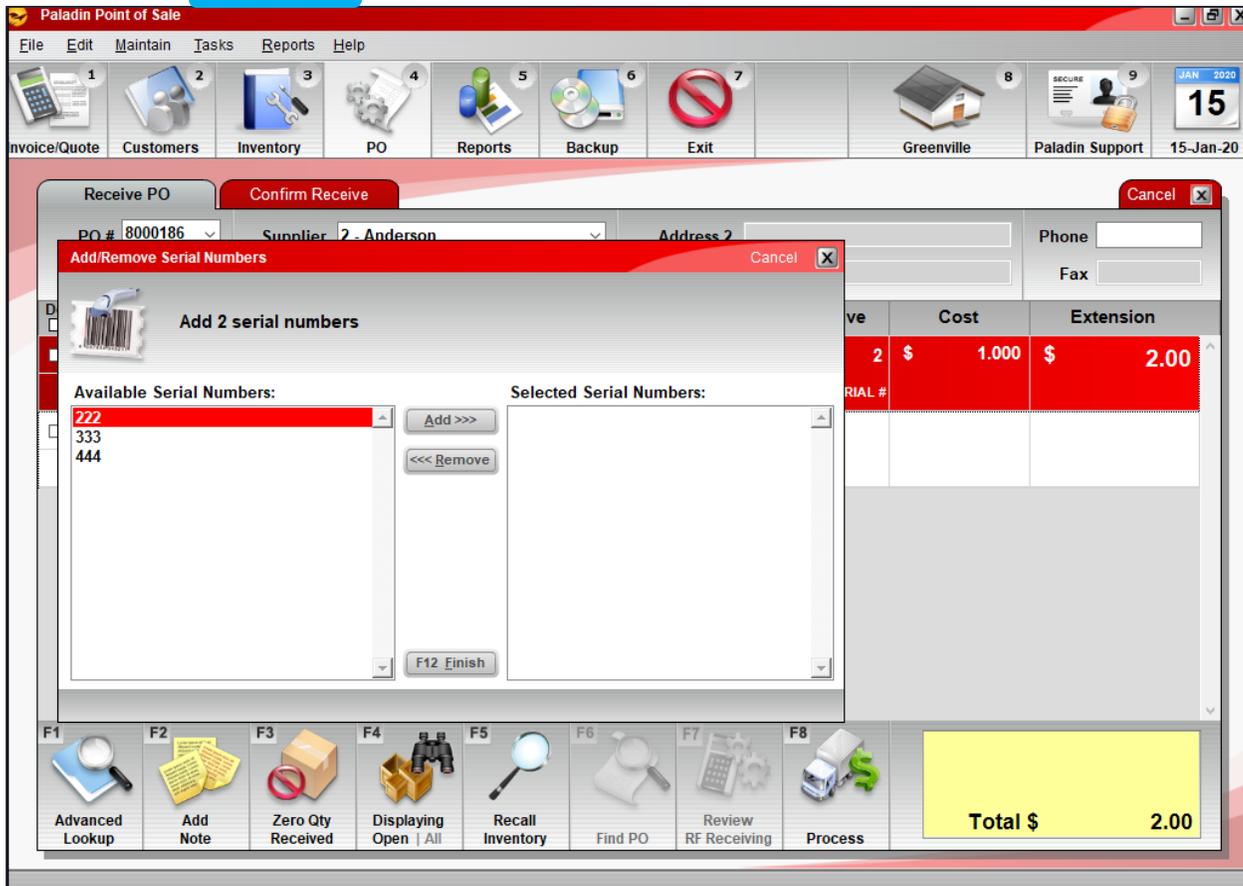


Serial Number List		
1 Report Settings		
Selection	Beginning	Ending
PartNumber	<input type="text"/>	<input type="text" value="ZZZZZZZZZZZZZZ"/>
Department	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Supplier	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Class	<input type="text" value="0"/>	<input type="text" value="99999999"/>
SubClass	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Location	<input type="text" value="0"/>	<input type="text" value="99999999"/>

Multi-store serialized item transfers

PO and Inventory modules

Multi-store serialized item transfers: PO module



The screenshot displays the 'Paladin Point of Sale' software interface. The main window shows a 'Receive PO' dialog box with fields for PO # (8000186), Supplier (2 - Anderson), and Address 2. A table below shows item details:

Quantity	Cost	Extension
2	\$ 1.000	\$ 2.00

An 'Add/Remove Serial Numbers' dialog box is open, showing a list of 'Available Serial Numbers' (222, 333, 444) and a 'Selected Serial Numbers' list. The 'Add >>>' button is highlighted. The bottom of the interface features a toolbar with function keys (F1-F8) and a 'Total \$ 2.00' display.

Scenario 1: A store creates a PO to transfer an item from another store.

When the item is received, the store must select the item's serial number from the other store's **Available Serial Numbers** list.

Multi-store serialized item transfers: Inventory F7 Transfer



Inventory Order Control Pricing General Cancel

Part # 1 Desc 1 WHOLEGOODS MISC On Order: 1 Defective: 0 On Hold: 0 Stock On Hand 0

Alt # 809711002736 Desc 2

Transfer Select Cancel

Click store to select serial numbers to transfer and hit Transfer [F8]

Transfer Qty	Store Number	Zone	Store Name	Description 1	SOH	On Order	Last Sold Date	Price
	2		Anderson	WHOLEGOODS MISC	2	0		\$1.80
	3							\$1.80
								\$1.80

Serial Number Select Cancel

Select serial numbers to transfer

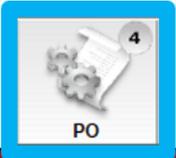
Serial Number	Received Date	Received Cost	PO Number
<input checked="" type="checkbox"/> 333	15-Jan-20 16:35		
<input type="checkbox"/> 444	15-Jan-20 16:35		

OK

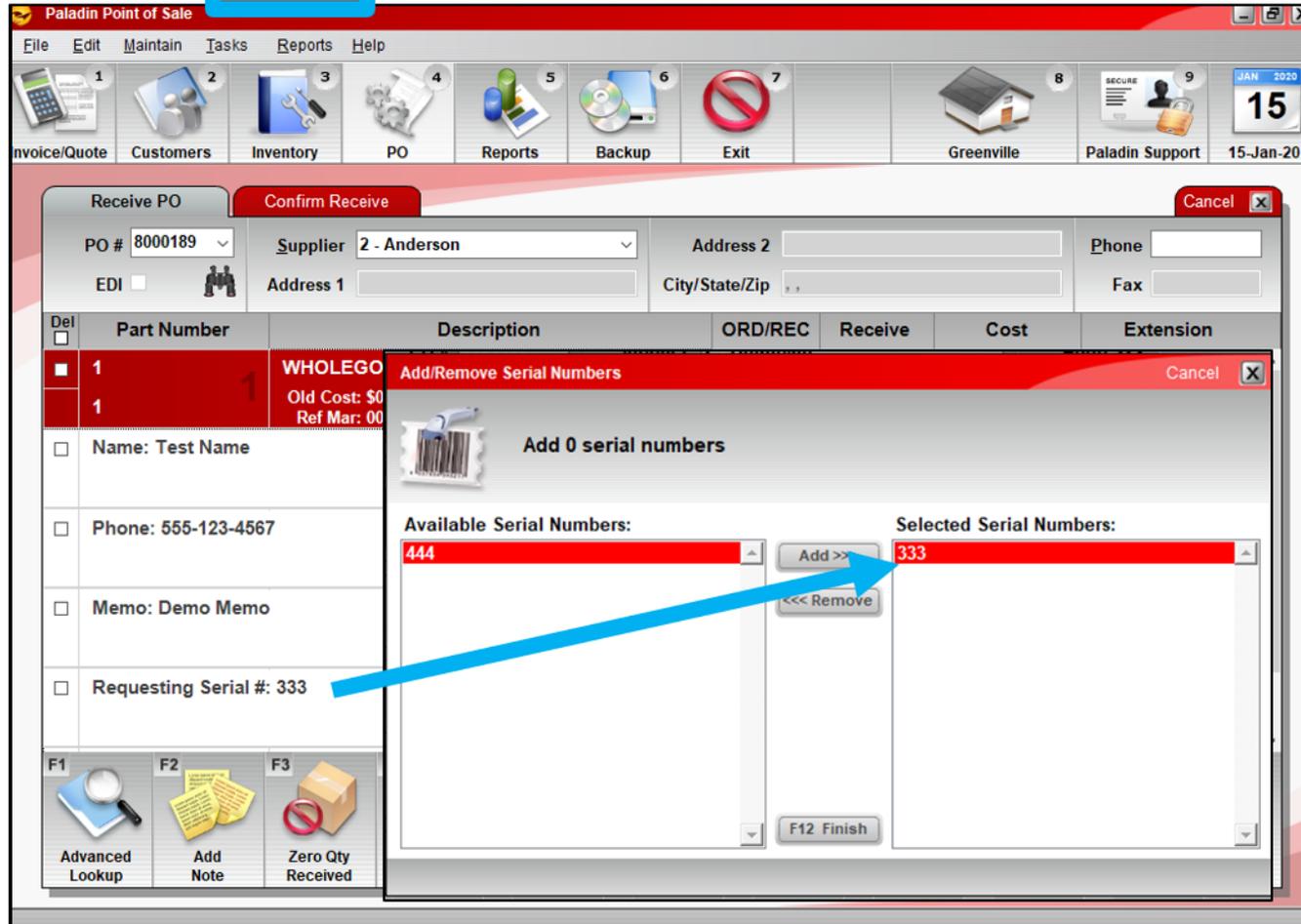
Scenario 2: A store uses the uses the F7 transfer feature (bottom ribbon in the **Inventory** module) to transfer an item from another store.

When the request is made, the receiving store must select a specific serial number to transfer.

The PO that is created includes the selected serial number in a note.



Multi-store serialized item transfers: Inventory F7 Transfer



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Greenville 9 Paladin Support 15-Jan-20

Receive PO Confirm Receive Cancel

PO # 8000189 Supplier 2 - Anderson Address 2 Phone

EDI Address 1 City/State/Zip Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	1	WHOLEGO				
	1	Add/Remove Serial Numbers				
<input type="checkbox"/>	Name: Test Name					
<input type="checkbox"/>	Phone: 555-123-4567					
<input type="checkbox"/>	Memo: Demo Memo					
<input type="checkbox"/>	Requesting Serial #: 333					

Add/Remove Serial Numbers Cancel

Add 0 serial numbers

Available Serial Numbers: Selected Serial Numbers:

444 Add >> 333 <<< Remove

F12 Finish

F1 Advanced Lookup F2 Add Note F3 Zero Qty Received

When item is received, the serial number is automatically selected on the PO, but can be changed.



Check out our [Winter 2019-2020 Release Guide](#)
on the Help Portal.

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